

## **Job Description**

**Position:** Financial Advisor

**Company:** Transcend Holistic Wellness, LLC

**Location:** 2926 Billy Williams Drive, Whistler, AL 36612-1966

### **About Transcend Holistic Wellness, LLC:**

At Transcend Holistic Wellness, LLC, we are driven by a passion to nurture a culture of growth, inclusivity, and excellence. Our mission is empowering individuals and communities to achieve holistic well-being through innovative programs, transformative education, and compassionate service. We are dedicated to creating a workplace where every team member feels valued, respected, and inspired to contribute their unique talents to our shared vision.

### **About the Role:**

As a Financial Advisor at Transcend Holistic Wellness, LLC, you will be pivotal in empowering our clients to achieve their financial goals and secure their financial futures. You will work closely with clients to develop personalized financial plans, provide guidance on investment strategies, and offer education on financial literacy and decision-making.

### **Responsibilities:**

- Develop and implement comprehensive financial plans for individual and community clients
- Guide investment strategies, financial literacy, and decision-making
- Conduct financial analysis and risk assessments
- Monitor and adjust financial plans as needed
- Stay abreast of industry trends and regulations
- Maintain client confidentiality and adhere to ethical standards

### **Qualifications:**

- Bachelor's degree in finance, accounting, or a related field
- Proven experience as a financial advisor, preferably within a public sector or educational context

- Strong understanding of financial planning, investment strategies, and state and federal regulations
- Excellent communication, interpersonal, and analytical skills
- Ability to work independently and as part of a team
- Commitment to ethical and responsible financial management

**Bonus Points:**

- Master's degree in Business Administration (MBA) or a related field
- Experience working with diverse communities
- Knowledge of educational financial procedures

**Compensation:**

- **Competitive salary:** \$60,000 - \$80,000 per year, commensurate with experience and qualifications
- Comprehensive benefits package, including health insurance, retirement plan, and paid time off

**How to Apply:**

If you are interested in joining our team and making a positive impact on the lives of others, please submit your resume and a cover letter expressing your interest in the Financial Advisor position to [dralvinwest@transcendholisticwellness.com](mailto:dralvinwest@transcendholisticwellness.com)

**We are an Equal Opportunity Employer:**

Transcend Holistic Wellness, LLC, is an equal-opportunity employer and values diversity at our company. We do not discriminate based on race, religion, color, national origin, gender, sexual orientation, age, marital status, veteran status, or disability status.